

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS

2018 AUG 31 PM 5:05

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Postsecondary National Policy Institute (PNPI)

Private Sponsor(s) (list all): _____

Travel date(s): August 8-10, 2018

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$348.42	\$296	\$73.31	\$0
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	N/A	N/A	N/A	N/A
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Attended a seminar on the Pell Grant program. See agenda for additional information.

8/24/18
(Date)

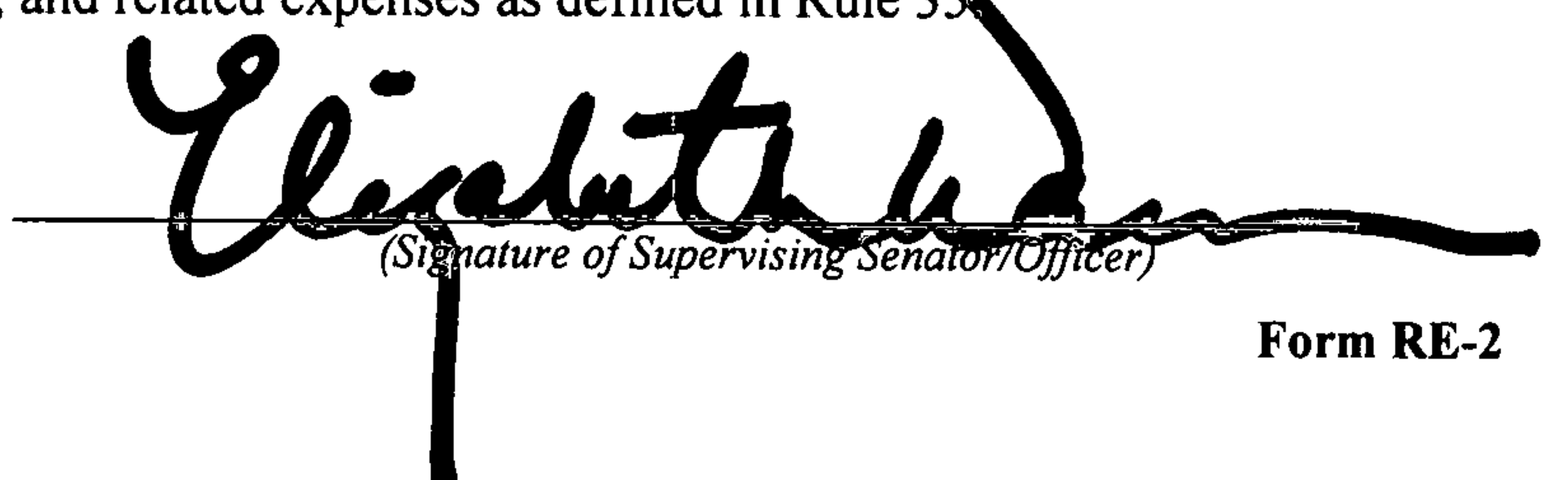
Josh Delaney
(Printed name of traveler)


(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

8-23-18
(Date)


(Signature of Supervising Senator/Officer)



Wednesday, August 8 – Friday, August 10
Atlanta, GA

Increase participants' understanding of the roles that institutions play in enrolling, supporting, and graduating Pell Grant recipients;

- # AGENDA

6:35 PM-8:30PM

8:30 PM-9:00PM

9:00 PM

Check-In: Georgian Terrace Hotel, Atlanta, Georgia

7:30 AM - 8:30 AM

8:30 AM - 9:00 AM

Travel to Georgia State University (GSU)

9:00 AM - 10:00 AM Overview of Student Success Programs at GSU
Georgia State University, Atlanta, Georgia

Speaker:

Tim Renick, Ph.D., Senior Vice President for Student Success

Questions for Dr. Renick:

- How did GSU increase the enrollment of Pell Grant students? Why was increasing Pell Grant student enrollment important to GSU?
- What challenges does GSU face in enrolling 25,000 Pell Grant students each semester?
- What sort of supports are in place for Pell Grant students at GSU?
- Your institution reports higher completion rates of Pell Grant recipients in comparison to the national average. How does your institution accomplish this?
- What's your advice to other institutions seeking to improve the enrollment and completion rates of Pell Grant recipients?

10:00 AM - 10:30 AM Improving Academic Advisement through Predictive Analytics
and Proactive Interventions
Georgia State University, Atlanta, Georgia

Speakers:

Allison Calhoun-Brown, Ph.D., Associate Vice President for Student Success

Carol Cohen, Director of the University Advisement Center

Questions for Speakers:

- What is the role that data and technology (including predictive analytics and AI) play in supporting student success at GSU?
- What are the impacts of these interventions on Pell Grant students and other students from underserved backgrounds?

10:30 AM - 11:00 AM Tour of University Advisement Center
Georgia State University, Atlanta, Georgia

Congressional participants will see and interact with students being advised through technological platforms deploying academic and financial predictive analytics.

11:00 AM - 12:00 PM Meeting with Pell Grant Students
Georgia State University, Atlanta, Georgia

Speakers:

Eric Cuevas, Director of Student Success Programs

GSU Pell Grant Students, TBD (to be selected by GSU)



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- 12:00 PM -1:00 PM**

Speaker:

Questions for President Becker:

- 1:00 PM - 1:30 PM**

Speaker:

Question for Discussion:

- 1:30 PM - 2:00 PM**

Travel to Georgia Institute of Technology (Georgia Tech)

2:00 PM - 3:00 PM

Welcome and Meeting with Pell Grant Students Georgia Tech, Atlanta, Georgia

Speaker:

Jeff Cullen, Assistant Director for Federal Relations
Georgia Tech Pell Grant Students, TBD (to be selected by Georgia Tech)

Questions for Panelist Discussion:

- What has been your experience as a Pell Grant recipient at Georgia Tech?
- What financial challenges have you faced at Georgia Tech as a Pell Grant recipient? How far has the Pell Grant gone in covering your educational expenses?
- What impactful financial interventions have you received?
- What academic supports have you received that have made a difference?

3:00 PM - 3:45 PM Overview of Georgia Tech’s Pell Grant Student Supports
Georgia Tech, Atlanta, Georgia

Speaker:
Paul Kohn, Vice Provost for Enrollment Services

Questions for Dr. Kohn:

- Your institution reports higher completion rates of Pell Grant recipients in comparison to the national average. How have you accomplished this?
- What sort of supports are in place for Pell Grant students at Georgia Tech?
- What future goals do you have for increasing Pell Grant student enrollment and graduation?
- What’s your advice to other institutions seeking to improve their enrollment and completion rates of Pell Grant recipients?

3:45 PM - 4:15 PM Attracting Pell Grant Recipients
Georgia Tech, Atlanta, Georgia

Speakers:
Rick Clark, Director of Undergraduate Admission

Questions for Dr. Clark:

- How did Georgia Tech increase enrollment of Pell Grant students?
- What challenges do you face in recruiting Pell Grant students?
- What’s your advice for institutions seeking to improve their enrollment of Pell Grant recipients?

4:15 PM - 4:30 PM Break
Georgia Tech, Atlanta, Georgia

4:30 PM - 5:00 PM How Georgia Tech Helps Accepted and Enrolled Pell Grant Students
Georgia Tech, Atlanta, Georgia

Speakers:
Marie Mons, Director of Scholarships and Financial Aid

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- 5:00 PM - 5:30 PM**

Georgia Tech, Atlanta, Georgia

Jeff Cullen, Assistant Director for Federal Relations

5:30 PM - 6:15 PM

Georgian Terrace Hotel, Atlanta, GA

Travel to Dinner at Baraonda Ristorante, Atlanta, GA

Working Dinner at Baraonda Ristorante, Atlanta, GA

- What are your biggest takeaways from what you heard today from administrators and students at GSU and Georgia Tech?
- What questions do you still have about how these institutions serve and support Pell Grant students?
- What were you most surprised to learn?
- What was the most important takeaway from the students you met with at both institutions?

Travel back to Hotel

Georgian Terrace Hotel, Atlanta, GA

Friday, August 10

Check-out/Breakfast & Wrap up Discussion

Facilitators:

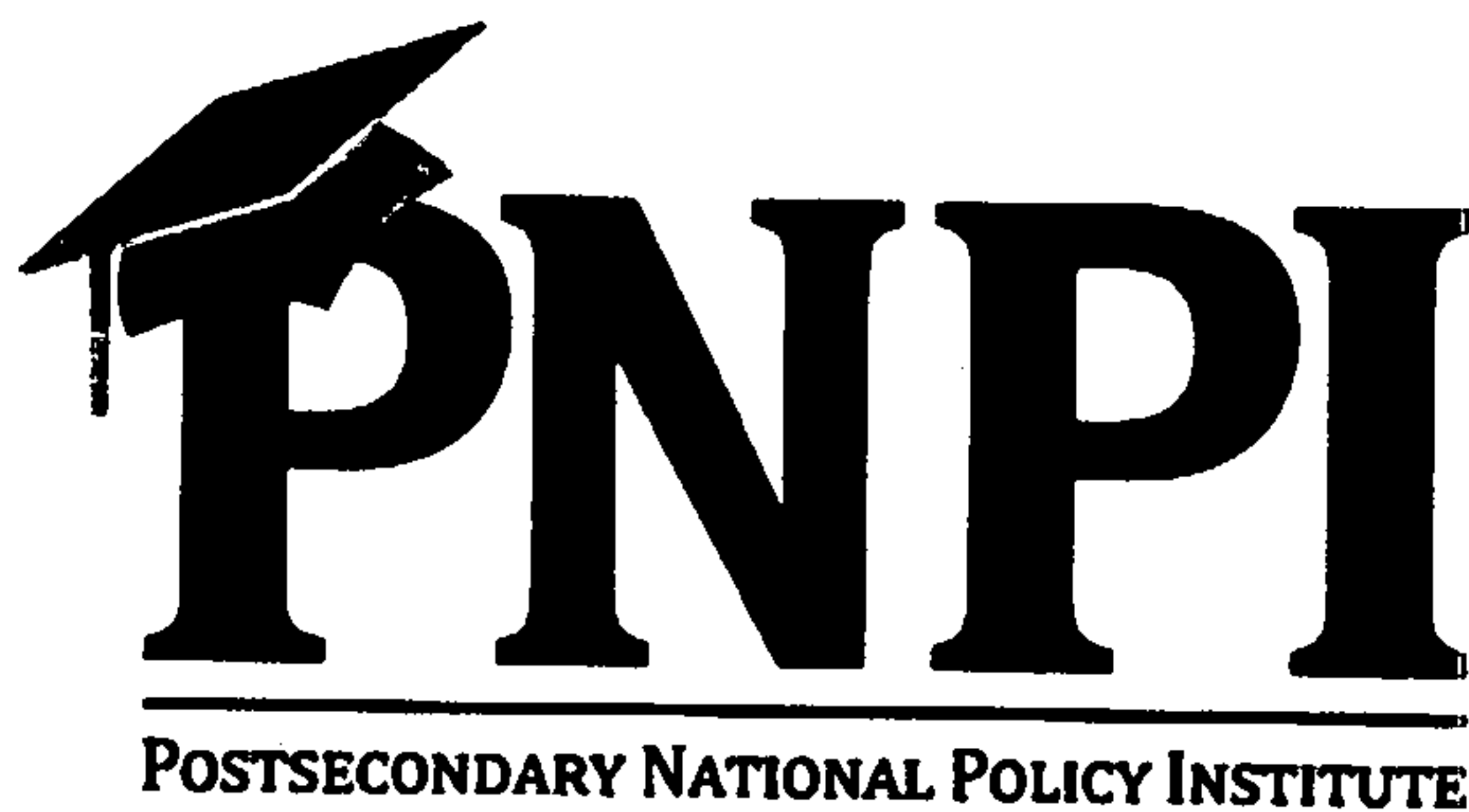
MaryEllen McGuire, President, PNPI

Jessica Bowen, Associate Federal Director, PNPI

Questions for Discussion:

- What more would you have liked to have learned on this trip?
- What follow-up programming might you be interested in regarding the federal Pell Grant program and Pell Grant recipients?
- What further questions about the Pell Grant program and Pell Grant recipients do you have?

7:45 AM - 8:15 AM	Drive to Airport
8:15 AM - 10:15 AM	Check-in at Airport/Arrive at Departing Gate
10:15 AM - 12:10 PM	Depart Atlanta, Georgia (ATL) for Baltimore Washington International (BWI) Southwest Airlines Flight #892
12:10 PM	Arrive Baltimore Washington International (BWI)



June 22, 2018

Dear Josh Delaney,

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) *Rediscovering Pell* seminar, August 8-10, 2018, in Atlanta, Georgia. This seminar is designed to increase your understanding of the role that institutions play in enrolling, supporting, retaining, and graduating Pell Grant students. The seminar will also increase your understanding of the experiences Pell Grant students have on campus.

Included with this invitation are the forms necessary for ethics rules compliance. **By Monday, July 9, 2018, you must submit these included forms and documents directly to the Ethics Committee in Hart 220. They are:**

- A copy of this PNPI invitation;
- A completed Private Sponsor Travel Certification Form with all attachments, including a Senate invitee list;
- An itinerary and agenda; and
- A completed and signed Employee Pre-Travel Authorization Form.

After receiving the completed travel package, the Ethics Committee will review the package and issue an approval for travel to you or your sponsoring Member. The Ethics Committee advises all Senate employees to maintain copies of all submitted forms for their own records. After the seminar, we will provide you with a post-travel form that you will need to complete and submit to the Office of Public Records.

Even if you are unsure whether you will be able to attend the seminar, please submit the paperwork so you will have the option to participate. **Paperwork submitted to the Ethics Committee after the deadline will not be considered.**

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations. No government, individual, foreign, corporate or special interest money is accepted. The foundations supporting PNPI are the Bill and Melinda Gates Foundation, the Lumina Foundation, and the Kresge Foundation. PNPI is the sole sponsor, planner and executor of the trip. PNPI maintains autonomy over the agenda, invitations and materials provided before and after the seminar.

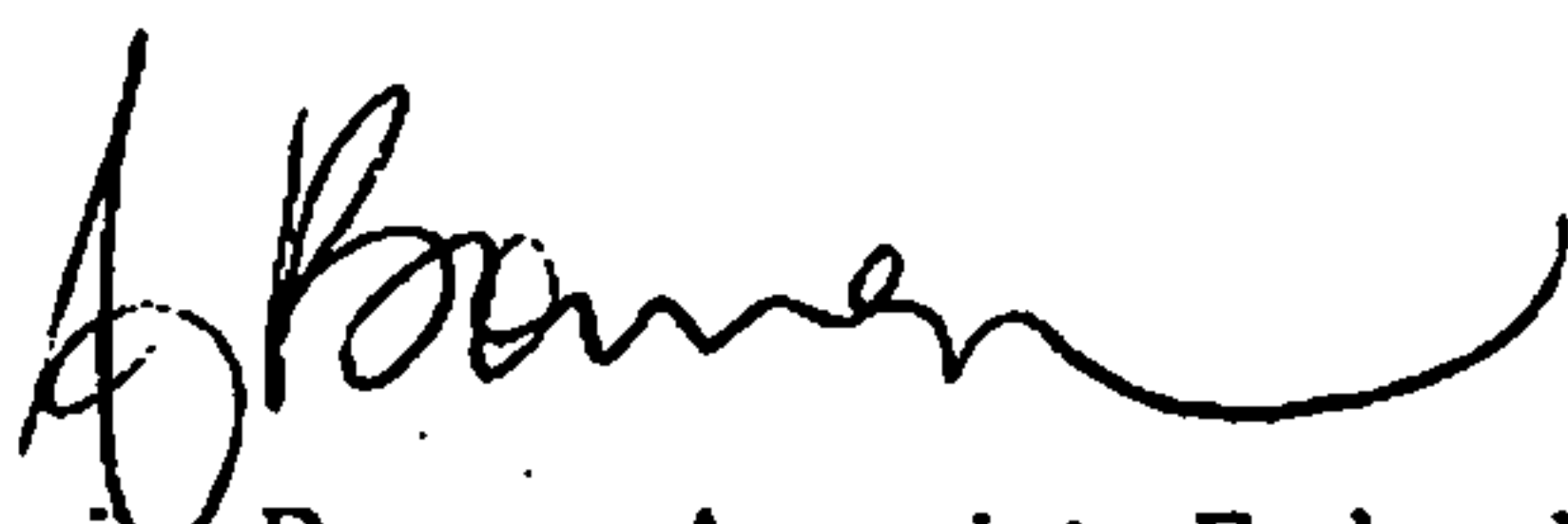
We will depart for Atlanta on Wednesday, August 8 at 6:35 PM EST from Baltimore/Washington International Thurgood Marshall Airport (BWI) and return to BWI on Friday, August 10 at 12:10 PM EST. The program will begin at Georgia State University, Atlanta, Georgia on Thursday, August 9 at 9:00 AM EST and will conclude on Friday, August 10 at 8:00 AM EST. If you have any questions about the seminar, please do not hesitate to email or call us directly.

PNPI's *Rediscovering Pell* seminar promises to be both educational and productive. We look forward to your participation!

Sincerely,



MaryEllen McGuire, President
Postsecondary National Policy Institute (PNPI)
mcguire@pnpi.org
202-407-3172



Jessica Bowen, Associate Federal Director
Postsecondary National Policy Institute (PNPI)
bowen@pnpi.org
202-407-3172

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Postsecondary National Policy Institute (PNPI)
2. Description of the trip: This trip is designed to increase staff's knowledge of the roles that institutions play, and the challenges they face, in enrolling, supporting, and graduating Pell Grant students.
3. Dates of travel: August 8-10, 2018 (two nights overnight)
4. Place of travel: Atlanta, GA
5. Name and title of Senate invitees: See attached.
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND -
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

—OR—

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

—OR—

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

PNPI is the sole sponsor, planner and executor of the trip. PNPI created the agenda, developed the invitation list and is managing all event panels and logistics.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

PNPI provides professional development to current and prospective policymakers who work on higher education issues. This event is designed to increase congressional staff's knowledge of the federal Pell Grant program.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

Since 2012, PNPI has sponsored nineteen congressional staff seminars on postsecondary topics including federal student aid, higher education accreditation, student data, and competency-based education.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to multi-day seminars, PNPI sponsors Hill-based briefings for larger Hill audiences and is available to all congressional staff for postsecondary related research support. PNPI also offers professional development, briefings, and boot camps to prospective policymakers.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$365.57 (round trip flight cost, round trip MARC train tickets from Union Station D.C. to BWI and on the ground shuttle to meetings)	\$296	\$95	\$0

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

The trip is arranged and organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Both Georgia State University and Georgia Tech have received national recognition for successfully improving outcomes for Pell Grant students.

19. Name and location of hotel or other lodging facility:

Georgian Terrace, 659 Peachtree Street NE, Atlanta, Georgia 30308

20. Reason(s) for selecting hotel or other lodging facility:

The Georgian Terrace is in proximity to both Georgia State University and Georgia Tech.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging for congressional staff costs \$148/night, the federal per diem. Meal costs are \$5 on day one

(snacks), \$69 on day two (breakfast, lunch, dinner, snacks) and \$21 on day three (breakfast, snacks). All

rates are at the federal per diem.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

All air travel will be coach class.

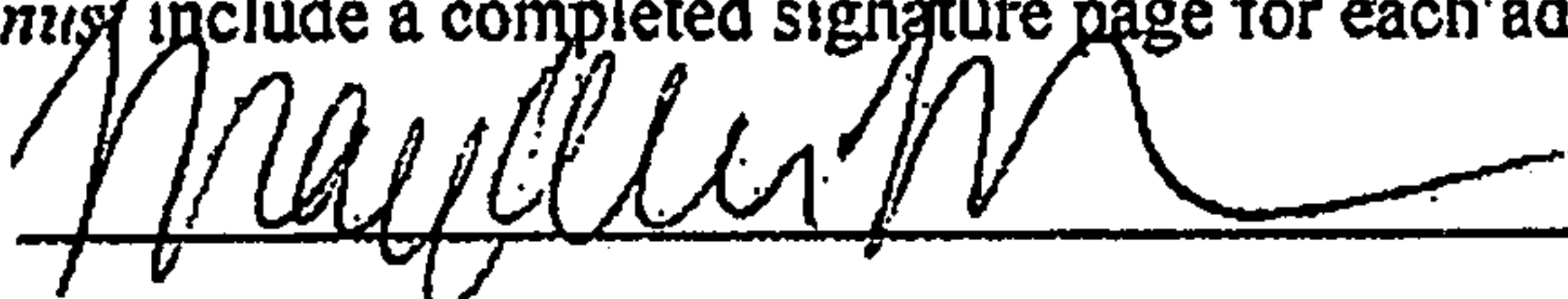
23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:



Name and Title: MaryEllen McGuire, President

Name of Organization: Postsecondary National Policy Institute (PNPI)

Address: 718 7th Street NW, Floor 2, Washington, DC 20001

Telephone Number: 202-407-3172

Fax Number:

E-mail Address: mcguire@pnpi.org

ATTACHMENT:
Senate Private Sponsor Travel Certification Form

5. Name and title of Senate invitees:

Mary Nguyen Barry
Policy Advisor
Senator Murray

Ericka King
Legislative Aide
Senator Paul

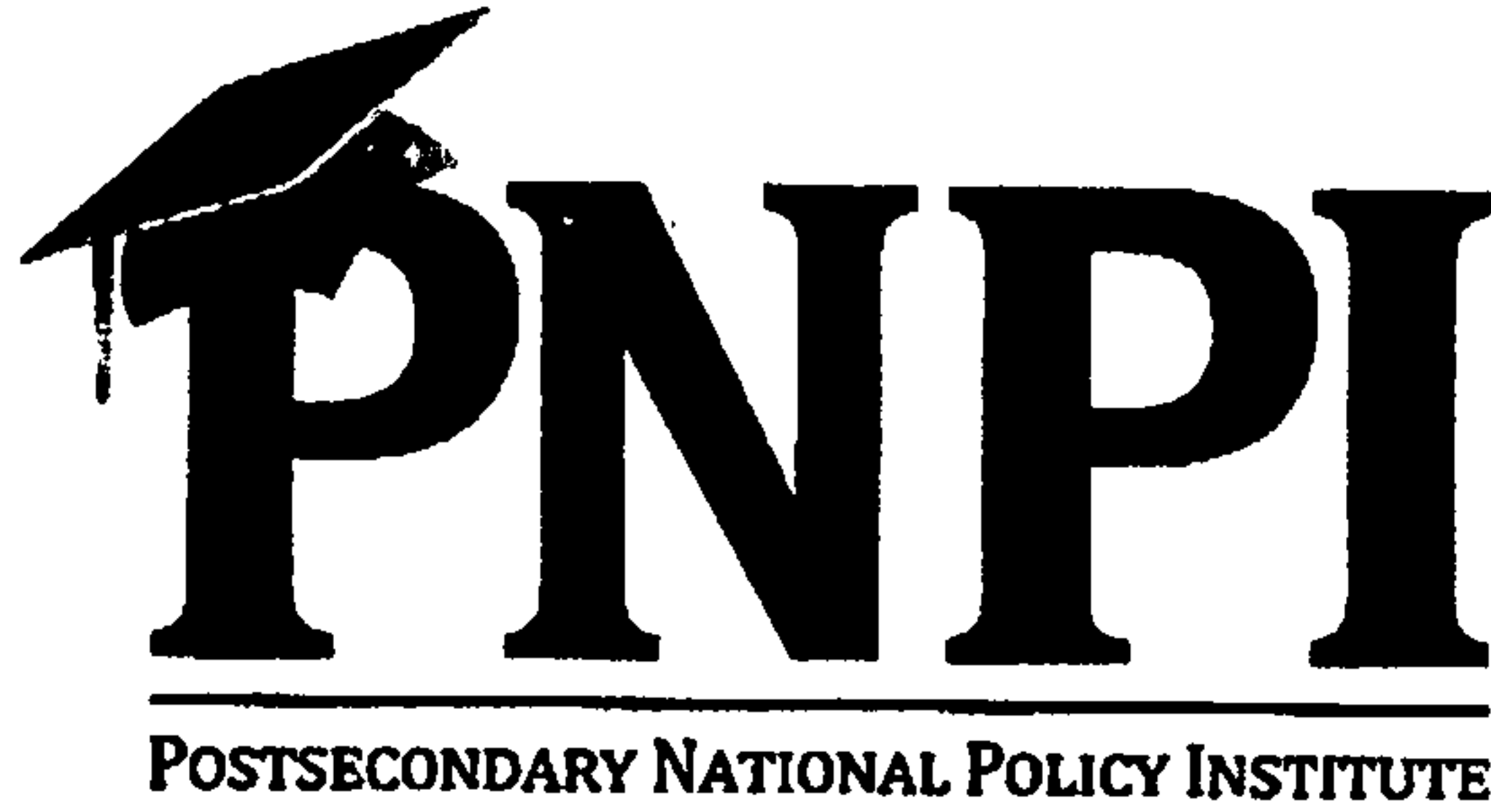
Josh Delaney
Senior Education Policy Advisor
Senator Warren

Tashayla Person
Legislative Assistant
Senator Roberts

Mike Gentile
Professional Staff
Senate Labor-HHS-Education
Appropriations Subcommittee

All staff were invited due to their employment with the Senate HELP Committee, the Senate Appropriations Committee, or with a Member who sits on the Senate HELP or Senate Appropriations committees:

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Rediscovering Pell

Wednesday, August 8 – Friday, August 10
Atlanta, GA

SEMINAR GOALS

- Increase participants' understanding of the roles that institutions play in enrolling, supporting, and graduating Pell Grant recipients;
- Increase participants' understanding of the challenges institutions face in enrolling, supporting, and graduating Pell Grant recipients; and
- Increase participants' understanding of the experiences Pell Grant students have on campus.

AGENDA

Wednesday, August 8

- | | |
|-----------------------|---|
| 6:35 PM-8:30PM | Depart Baltimore Washington International (BWI) for Atlanta, Georgia (ATL)
Southwest Airlines Flight # 295 |
| 8:30 PM-9:00PM | Arrive in Atlanta, Georgia (ATL)
Depart Airport for Georgian Terrace Hotel |
| 9:00 PM | Check-In: Georgian Terrace Hotel, Atlanta, Georgia |

Thursday, August 9

- | | |
|--------------------------|---|
| 8:00 AM - 8:30 AM | Breakfast
Georgian Terrace Hotel |
| 8:30 AM - 9:00 AM | Travel to Georgia State University (GSU) |

9:00 AM - 10:00 AM

**Overview of Student Success Programs at GSU
Georgia State University, Atlanta, Georgia**

Speaker:

Tim Renick, Ph.D., Senior Vice President for Student Success

Questions for Dr. Renick:

- How did GSU increase the enrollment of Pell Grant students? Why was increasing Pell Grant student enrollment important to GSU?
- What challenges does GSU face in enrolling 25,000 Pell Grant students each semester?
- What sort of supports are in place for Pell Grant students at GSU?
- Your institution reports higher completion rates of Pell Grant recipients in comparison to the national average. How does your institution accomplish this?
- What's your advice to other institutions seeking to improve the enrollment and completion rates of Pell Grant recipients?

10:00 AM - 10:30 AM

**Improving Academic Advisement through Predictive Analytics
and Proactive Interventions
Georgia State University, Atlanta, Georgia**

Speakers:

*Allison Calhoun-Brown, Ph.D., Associate Vice President for Student Success
Carol Cohen, Director of the University Advisement Center*

Questions for Speakers:

- What is the role that data and technology (including predictive analytics and AI) play in supporting student success at GSU?
- What are the impacts of these interventions on Pell Grant students and other students from underserved backgrounds?

10:30 AM - 11:00 AM

**Tour of University Advisement Center
Georgia State University, Atlanta, Georgia**

Congressional participants will see and interact with students being advised through technological platforms deploying academic and financial predictive analytics.

11:00 AM - 12:00 PM

**Meeting with Pell Grant Students
Georgia State University, Atlanta, Georgia**

Speakers:

*Eric Cuevas, Director of Student Success Programs
GSU Pell Grant Students, TBD (to be selected by GSU)*

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Questions for Student Discussion:

- What has been your experience as a Pell Grant recipient at GSU?
- What financial challenges have you faced as a Pell Grant recipient? How far has the Pell Grant gone in covering your educational expenses?
- What impactful financial interventions have you received?
- What helpful academic supports have you received?
- How helpful have you found your academic advising to be at GSU?

12:00 PM -1:00 PM

**Working Lunch with GSU President Mark P. Becker
Georgia State University, Atlanta, Georgia**

Speaker:

President Mark P. Becker, Ph.D.

Questions for President Becker:

- Looking back at GSU's substantial gains in serving Pell Grant students, what would you attribute the success to?
- GSU is widely recognized for its groundbreaking innovations. What has been necessary for your leadership team to do in order for your institution to serve such large numbers of Pell Grant students and eliminate disparities in graduation rates?
- What challenges has GSU leadership faced in this work?
- What advice would you give to an institution looking to expand the number of Pell Grant students they recruit and serve?

1:00 PM -1:30 PM

**Wrap Up
Georgia State University, Atlanta, Georgia**

Speaker:

Tim Renick, Ph.D., Senior Vice President for Student Success

Question for Discussion:

- What questions do you still have about how GSU serves and supports Pell Grant students?
- Is there any program or service you learned about today that you would like to hear more about?

1:30 PM - 2:00 PM

Travel to Georgia Institute of Technology (Georgia Tech)

2:00 PM - 2:30 PM

**Overview of Georgia Tech's Pell Grant Student Supports
Georgia Tech, Atlanta, Georgia**

Speaker:

Paul Kohn, Vice Provost for Enrollment Services

Questions for Dr. Kohn:

- Your institution reports higher completion rates of Pell Grant recipients in comparison to the national average. How have you accomplished this?
- What sort of supports are in place for Pell Grant students at Georgia Tech?
- What future goals do you have for increasing Pell Grant student enrollment and graduation?
- What's your advice to other institutions seeking to improve their enrollment and completion rates of Pell Grant recipients?

2:30 PM - 3:30 PM

**Attracting Pell Grant Recipients
Georgia Tech, Atlanta, Georgia**

Speaker:

Rick Clark, Director of Undergraduate Admissions

Questions for Dr. Clark:

- How did Georgia Tech increase enrollment of Pell Grant students?
- What challenges do you face in recruiting Pell Grant students?
What's your advice for institutions seeking to improve their enrollment of Pell Grant recipients?

3:30 PM - 4:30 PM

**How Georgia Tech Helps Accepted and Enrolled Pell Grant Students
Georgia Tech, Atlanta, Georgia**

Speakers:

Marie Mons, Director of Office of Scholarships and Financial Aid

Questions for Ms. Mons:

- How did your institution increase its completion rates of Pell Grant recipients? What supports are in place for these students?
What's your advice to other institutions seeking to improve completion rates for Pell Grant recipients?

4:30 PM - 5:30 PM

**Meeting with Pell Grant Students
Georgia Tech, Atlanta, Georgia**

Speakers:

Georgia Tech Pell Grant Students, TBD (to be selected by Georgia Tech)

Questions for Panelist Discussion:

- What has been your experience as a Pell Grant recipient at Georgia Tech?
- What financial challenges have you faced at Georgia Tech as a Pell Grant recipient? How far has the Pell Grant gone in covering your educational expenses?
- What impactful financial interventions have you received?
- What academic supports have you received that have made a difference?

5:30 PM - 6:15 PM	Break at Hotel Georgian Terrace Hotel, Atlanta, GA
6:15 PM - 6:30 PM	Travel to Dinner at Baraonda Ristorante, Atlanta, GA
6:30 PM - 8:00 PM	Working Dinner at Baraonda Ristorante, Atlanta, GA

Discussion Questions:

- What are your biggest takeaways from what you heard today from administrators and students at GSU and Georgia Tech?
- What questions do you still have about how these institutions serve and support Pell Grant students?
- What were you most surprised to learn?
- What was the most important takeaway from the students you met with at both institutions?

8:00 PM - 8:15 PM	Travel back to Hotel Georgian Terrace Hotel, Atlanta, GA
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Friday, August 10

7:00 AM - 8:00 AM	Check-out/Breakfast & Wrap up Discussion Georgian Terrace Hotel, Atlanta, GA
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Facilitators:

MaryEllen McGuire, President, PNPI

Jessica Bowen, Associate Federal Director, PNPI

Questions for Discussion:

- What more would you have liked to have learned on this trip?
- What follow-up programming might you be interested in regarding the federal Pell Grant program and Pell Grant recipients?
- What further questions about the Pell Grant program and Pell Grant recipients do you have?

8:00 AM - 8:30 AM	Drive to Airport
8:30 AM - 10:15 AM	Check-in at Airport/Arrive at Departing Gate
10:15 AM - 12:10 PM	Depart Atlanta, Georgia (ATL) for Baltimore Washington International (BWI) Southwest Airlines Flight #892
12:10 PM	Arrive Baltimore Washington International (BWI)

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Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Josh Delaney

Employing Office/Committee: Senator Warren

Private Sponsor(s) (list all): Postsecondary National Policy Institute (PNPI)

Travel date(s): August 8-10, 2018

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): Atlanta, GA

Explain how this trip is specifically connected to the traveler's official or representational duties:

Joshua Delaney is Senator Elizabeth Warren's Senior Education Policy Advisor. Senator Warren is a member of the Senate Committee on Health, Education, Labor, and Pensions. Mr. Delaney advises Senator Warren on all higher education policy matters and issues. The subject of this travel is federal Pell Grant issues, which is a specific and timely issue in federal higher education policy. Mr. Delaney will use the knowledge from this travel to advise Senator Warren in Pell Grant issues.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

7/9/18
(Date)

Josh Delaney
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Elizabeth Warren hereby authorize Joshua Delaney
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

7.9.18
(Date)

Elizabeth Warren
(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Josh Delaney

Name of Traveler: _____

Employing Office/Committee: Senator WarrenPrivate Sponsor(s) (list all): Postsecondary National Policy Institute (PNPI)Travel date(s): April 4-6, 2018*Note: If you plan to extend the trip for any reason you must notify the Committee.*Destination(s): Manchester, NH and Haverhill, MA

Explain how this trip is specifically connected to the traveler's official or representational duties:

Joshua Delaney is the Senior Education Policy Advisor for Senator Elizabeth Warren, a member of the Senate Committee on Health, Education, Labor, and Pensions. In this role, Mr. Delaney advises Senator Warren on higher education matters. This trip is about competency-based education, a specific, timely, and relevant matter in federal higher education policy.

Name of accompanying family member (if any): N/ARelationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

3/5/18
 (Date)

J. Delaney
 (Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Sen. Elizabeth Warren hereby authorize Joshua Delaney
 (Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

3-5-18
 (Date)

Elizabeth Warren
 (Signature of Supervising Senator/Officer)



Competency-Based Education
Wednesday, April 4 – Friday, April 6
Manchester, New Hampshire & Haverhill, Massachusetts

SEMINAR GOALS

- Increase participants' understanding of the roles that faculty, employers and institutions of higher education play in supporting and implementing competency-based education (CBE) programs.
- Increase participants' understanding of how students experience CBE.
- Deepen staff knowledge of the CBE regulatory environment - how experimental sites authority is facilitating or challenging the use of CBE on college campuses.
- Extend participants' knowledge of how quality is assured in developing and implementing competency-based learning.

AGENDA

Wednesday, April 4

- | | |
|----------------|---|
| 7:35 PM | Depart Baltimore Washington International (BWI)
Southwest Airlines Flight # 1839 |
| 8:55 PM | Arrive Manchester, NH |
| 9:30 PM | Check-In: Fairfield Inn & Suites by Marriott-Hooksett, Hooksett,
New Hampshire |

Thursday, April 5

8:00 AM - 9:00 AM

**Working Breakfast/CBE Review
Fairfield Inn & Suites by Marriott-Hooksett**

Facilitators:

*MaryEllen McGuire
Jessica Bowen*

Questions for Discussion:

- What is competency-based education? What are some of its defining characteristics?
- What is the difference between competency-based education and prior learning assessment?
- What are the different types of competency-based education program designs?
- Who currently participates in competency-based education programs? What are the current demographics? What, if anything, do we know about these students' outcomes?

9:00 AM - 10:00 AM

Travel to Northern Essex Community College (NECC)

10:00 AM - 11:30 AM

**Welcome & Introduction to NECC and a course-based
model of Competency-Based Education
Northern Essex Community College, Haverhill,
Massachusetts**

Speakers:

*Dr. Kim Burns, Dean of Academic Innovations & Professional Development
Dr. Bill Heineman, Vice President of Academic & Student Affairs*

Questions for Discussion:

- What led to the creation of NECC's CBE programs?
- What are the various types of CBE and where does course-based CBE fit?
- How was it created and designed? How do these programs currently work?
- Who is participating in your competency-based education programs?
- How are you evaluating your program? Do you have student outcome data to share?
- What is the Competency-Based Pathways in Early Education and Care Initiative?

11:30 AM - 12:30 PM

Working Lunch and Roundtable with Students, Learning Coach Ada Greenberg, and Faculty Members

Speakers:

Ada Greenberg, Learning Coach

Students and Faculty selected by NECC

Questions for Discussion:

- Faculty: How did you come to this teaching model? What sort of preparation have you received on teaching outside of a traditional classroom? How does this modality meet the needs of community college students? What have been some of the challenges you've faced? What changes would you make to this type of programming?
- Students: What attracted you to this program? Are things going as planned? What challenges have you faced/successes have you achieved?
- Learning Coach: What is your role? How do you support students?
- ALL: What advice do you have for policymakers interested in helping facilitate CBE?

12:30 PM - 1:30 PM The Federal Government, CBE & Lessons Learned

Speakers:

Dr. Bill Heineman, Director of Compliance

Heather Mores, Director of Compliance for Student Affairs

Dr. Kim Burns, Dean of Academic Innovations & Professional Development

Questions for Discussion:

- What has NECC's experience with the U.S. Department of Education's Experimental Sites Initiative been like?
- With regard to offering CBE programs generally, and with regard to working with the federal government under experimental sites authority, what lessons have you learned so far?
- What advice do you have for policymakers charged with rewriting current law? What does current law have right? What does current law have wrong? What additional guidance or support do you need from policymakers, the law or regulations?

1:30 PM - 2:30 PM Travel to Southern New Hampshire University (SNHU)

2:30 PM - 4:00 PM Arrive at Southern New Hampshire University (SNHU)
Welcome from Dr. Paul LeBlanc & Introduction to
SNHU/College for America

Speakers:

Paul LeBlanc, President of Southern New Hampshire University
William Hartglass, Vice President Strategic partnerships and Channel Development,
Workforce Partnerships
Dr. Kimberly Bogle Jubinville, Senior Vice President and University Chief Academic Officer
Colin Van Ostern, Vice President of Workforce Solutions, Workforce Partnerships
Amy Stevens, Executive Director of Competency-Based Education Programs

Questions for Discussion:

- What led to the creation of College for America?
- How does your program currently work?
- Who is participating in your competency-based education programs?
- How are you evaluating your program? Do you have student outcome data to share?
- What barriers to expansion currently exist at the federal, state and accrediting levels?
- What has SNHU's experience with the U.S. Department of Education's Experimental Sites Initiative been like?

4:00 PM - 5:15 PM Conversation with Students and Faculty Members

Speakers:

Students and Faculty selected by SNHU

Questions for Discussion:

- Faculty: What do the most successful students do differently? How are they successfully completing their coursework and their degrees? What sort of preparation have you received on teaching a CBE program? What have been some of the challenges you've faced?
- Students: What attracted you to this program? Are things going as planned? What challenges have you faced/successes have you achieved?

5:15 PM - 6:15 PM Break at Hotel

6:15 PM - 6:30 PM Travel to Dinner

6:30 PM - 8:00 PM Working Dinner with Dr. Paul LeBlanc: Reflections on CBE

Speakers:

Dr. Paul LeBlanc, President of Southern New Hampshire University

MaryEllen McGuire, President of the Postsecondary National Policy Institute

Questions for Discussion:

- Looking back at how your program has changed over time, what would you say are the major lessons learned?
- What advice would you give to an institution looking to create a CBE program?
- What does current available data, research and evaluations tell us about CBE programs as a whole? What data is missing?
- There is a concern that the expansion of CBE could also lead to an increase of bad actors and fraud. What would you say about these concerns?
- What are the potential advantages to increasing CBE programs?
- If you could make one change to the postsecondary system at the federal level, what would it be and why?

8:00 PM - 8:30 PM Travel back to hotel

Friday, April 6

**6:30 AM - 7:30 AM Check-out/Breakfast & Wrap up Discussion
Hotel**

Facilitators:

MaryEllen McGuire

Jessica Bowen

Questions for Discussion:

- How might the federal government further support the work of institutions like NECC and SNHU?
- If there is one key takeaway from the work of NECC and what would it be?
What follow up programming might you be interested in regarding competency-based education? What further questions do you have?

7:30 AM - 8:00 AM Drive to Airport/Wrap-Up Discussion on Bus

9:00 AM - 9:30 AM Check-out & Depart for Manchester Airport (MHT)

**9:00 AM - 10:35 AM Depart Manchester, New Hampshire (MHT)
for Baltimore/Washington International (BWI)
Flight # 1703**

10:35 AM Arrive Baltimore/Washington International (BWI)